

## Setting Performance Expectations

Pre-Load Screen:



**Narrator:** No audio.

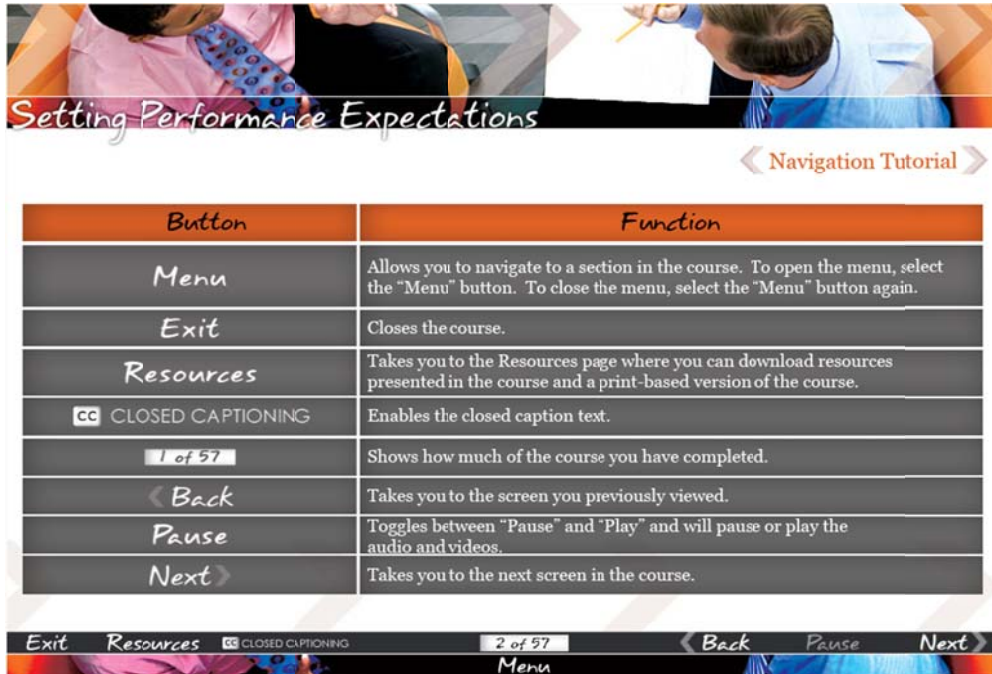
Screen 1:



**Narrator:** Welcome! You are about to begin the course *Setting Performance Expectations*.

Select the "Navigation Tutorial" button to learn how to navigate throughout the course. Otherwise, select the "Next" button and we'll begin.

## Screen 2:



The screen displays a video player interface. At the top, there is a header with the title "Setting Performance Expectations" and a navigation button labeled "Navigation Tutorial". Below the header is a table with two columns: "Button" and "Function". The table lists various navigation buttons and their functions. At the bottom of the screen, there is a video player control bar with buttons for "Exit", "Resources", "CC CLOSED CAPTIONING", a progress indicator "2 of 57", and navigation buttons "Back", "Pause", and "Next".

Button	Function
Menu	Allows you to navigate to a section in the course. To open the menu, select the "Menu" button. To close the menu, select the "Menu" button again.
Exit	Closes the course.
Resources	Takes you to the Resources page where you can download resources presented in the course and a print-based version of the course.
CC CLOSED CAPTIONING	Enables the closed caption text.
1 of 57	Shows how much of the course you have completed.
Back	Takes you to the screen you previously viewed.
Pause	Toggles between "Pause" and "Play" and will pause or play the audio and videos.
Next	Takes you to the next screen in the course.

**Narrator:** The navigation buttons are along the bottom of the screen. To open the course menu, select the "Menu" button. Within the menu you will see a list of each section in the course. To open a particular section, select the section title. The course will then advance to that section. The information in the table describes the functionality of the other navigation buttons. Take a moment to review this information. When you are done, select the "Next" button to begin the course.

## Screen 3:



The screen displays a video player interface. At the top, there is a header with the title "Setting Performance Expectations" and a navigation button labeled "Introduction". Below the header is a video player showing a scene with two people, a man and a woman, sitting at a desk. The man is wearing a suit and the woman is wearing a military uniform. The video player has a yellow box around the "Play" button. At the bottom of the screen, there is a video player control bar with buttons for "Exit", "Resources", "CC CLOSED CAPTIONING", a progress indicator "3 of 57", and navigation buttons "Back", "Pause", and "Next".

**Narrator:** Let's begin by watching a short video clip of a manager and her employee during a performance expectations discussion at the beginning of the rating cycle. Pay attention to whether Jade, the manager, and Elijah, the employee, effectively set the stage for a successful rating cycle.

Select the "Play" button.

## Video Script

**Setting:** Entertaining video of an exchange between a manager (Jade) and her employee (Elijah). The exchange occurs in Jade's office. Scene opens with Elijah talking on the phone in his cubicle. The audience only hears one side of the conversation. After Elijah finishes his phone conversation, he walks quickly down the hall towards Jade's office.

**Elijah:** *(sitting at his desk talking on the phone; glances at his watch)* Hey, Honey, I've got my performance meeting with Jade in five minutes. We can talk more when I get home tonight. *(pauses)* No, I doubt it will be any better than last year. I just want to get it over with. *(pauses)* Okay...I'll talk to you later. *(pauses)* What? *(pauses)* Oh, right. Yes, I'll be sure to tell Jade I need some time off when you have your surgery. *(pauses)* Sure. I really gotta go now. Bye. *(Hangs up phone and grabs his notepad and a pen.)*

*Elijah quickly walks down the hall towards Jade's office. When he reaches Jade's office, Elijah knocks on the open door.*

**Elijah:** Hello Jade, I'm here for my performance discussion.

*Jade is furiously typing at her computer. Jade's desk phone rings; she stops typing, signals a "come on in" hand gesture to Elijah, and answers the phone.*

**Jade:** *(into the phone receiver)* Hello?

*Elijah looks annoyed and sits down in the chair in front of Jade's desk. He is holding his notepad and pen in one of his hands.*

**Jade:** *(into the phone receiver)* UH-huh...ok... right.... *(Jade makes eye contact with Elijah, shrugs her shoulders, points to the phone receiver with her free hand, and mouths the word, "Sorry.")*

*Jade tucks the phone receiver between her shoulder and ear, picks up a document with one hand, [camera zooms to the document for a close-up entitled Performance Objectives and Performance Standards with the name Sydney Abraham scratched out and the name Elijah Jones hand written underneath the scratched out name] and with the other hand she cups the mouth piece of the phone and loudly whispers to Elijah.*

**Jade:** Here...study this performance objectives and performance standards document...it outlines your job expectations. *Jade tosses the document across her desk towards Elijah's direction.*

*Elijah puts his notepad on his lap, picks up the document, reads the cover page and then flips through the document scanning the pages. Jade returns her attention to the phone call and starts checking email.*

**Jade:** *(shakes her head)* No, I didn't attend the meeting on how to set performance expectations. My employees know what they are supposed to do. *Jade picks up a document from her desk reading back and forth between the document and her computer. She is still on the phone and nods her head from time to time.*

*While Elijah scans the document, he becomes increasingly agitated.*

**Elijah:** *(mumbles)* These objectives have nothing to do with MY job.

*Elijah rests his left elbow on his left knee and lowers his forehead to his hand. He shakes his head back and forth softly.*

**Elijah:** *(with his head still down he mumbles with great exasperation)* This is bad. Really bad. I have NO idea how to meet these objectives!

*Elijah then lets out a HUGE sigh that Jade mistakes for a sneeze.*

**Jade:** *(looks at her computer screen, oblivious to Elijah's obvious distress. She cups the mouthpiece of the phone)* Bless you.

*While holding a document in her hand, Jade nudges a bottle of hand disinfectant across her desk in Elijah's direction.*

**Jade:** *(into the phone receiver)* Really? Aligned with the Agency or Component goals...consensus...for Successful?

*Jade presses mute or hold button on the phone.*

**Jade:** *(to Elijah)* You should talk to your coworker, Sydney, if you have any questions or need clarification.

**Elijah:** *(sits up and gives Jade a perplexed gaze)* Uh, ok, but, Sydney and I have different jobs, we do different things.

*Jade depresses the mute or hold button.*

**Jade:** *(speaking into the phone matter-of-factly)* Gotta go, I have a performance discussion. *(pauses)* No, I use the same plan for all my employees. Bye....

**Jade:** *(grunts to herself (loud enough for Elijah to hear) while hanging up the phone)* Individualize performance expectations, UMPH, for what?

*Jade sits back in her chair and with her arms crossed she smiles toward Elijah.*

**Jade:** *(convincingly)* It doesn't matter what the job is because the performance elements and standards are exactly the same.

*Elijah withdraws from the conversation appearing to be in deep thought.*

**Jade:** Not to worry. Just do better than you did last year. And...*(hesitates for a moment while she searches for the right words)* well... let's keep what happened last year in the past? Okay?

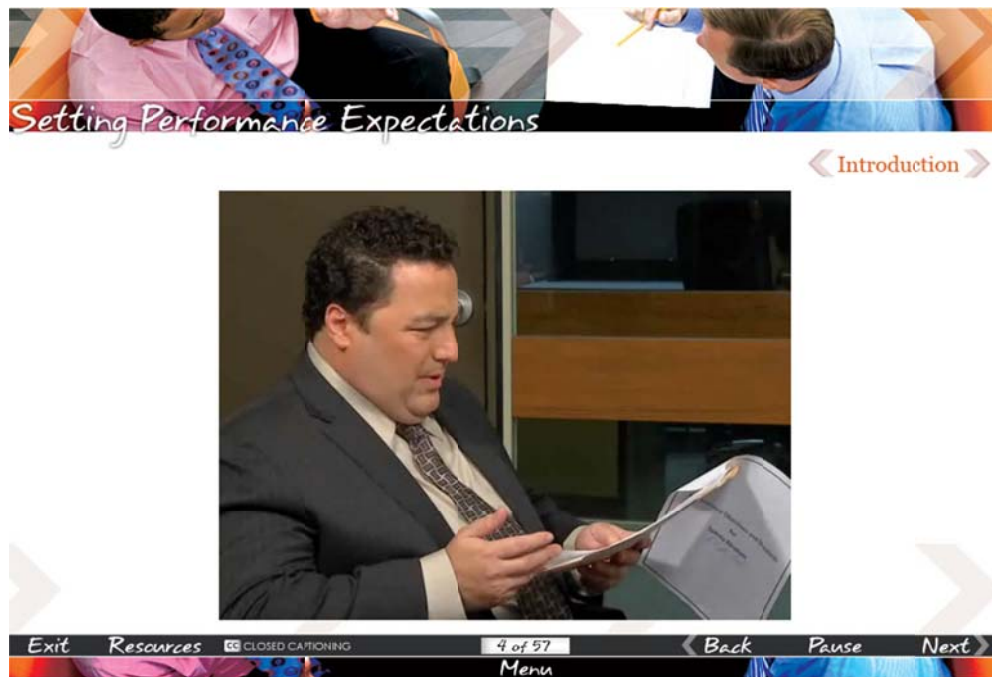
*Elijah gives Jade a perplexed look.*

**Jade:** *(ignores Elijah's perplexed look and shuffles papers on her desk; she doesn't make eye contact with Elijah)* I'm raising the bar this year and expect that all of my employees do Outstanding work.

**Elijah:** *(bewildered)* Outstanding? On everything?

*Video fades out.*

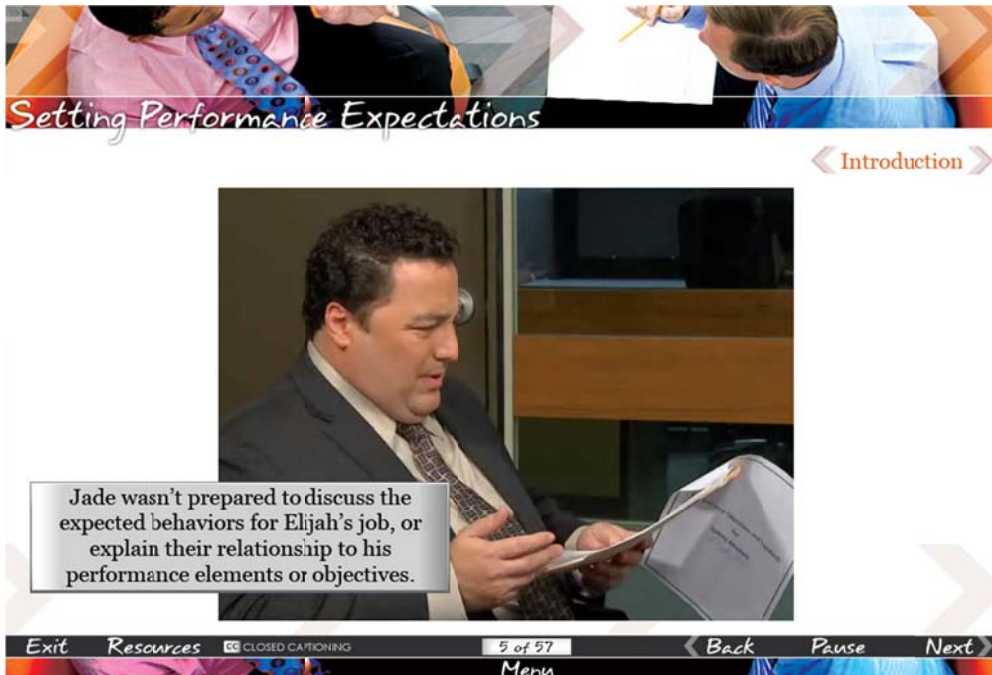
Screen 4:



The screenshot shows a video player interface. At the top, there is a banner with the title "Setting Performance Expectations" and a navigation button labeled "Introduction". Below the banner is a video frame showing a man in a suit looking at a document. At the bottom of the video frame, there is a control bar with buttons for "Exit", "Resources", "CLOSED CAPTIONING", "4 of 57", "Menu", "Back", "Pause", and "Next".

**Narrator:** What happened? Have you ever been unprepared like Jade, or overwhelmed like Elijah that you failed to communicate effectively?

Screen 5:

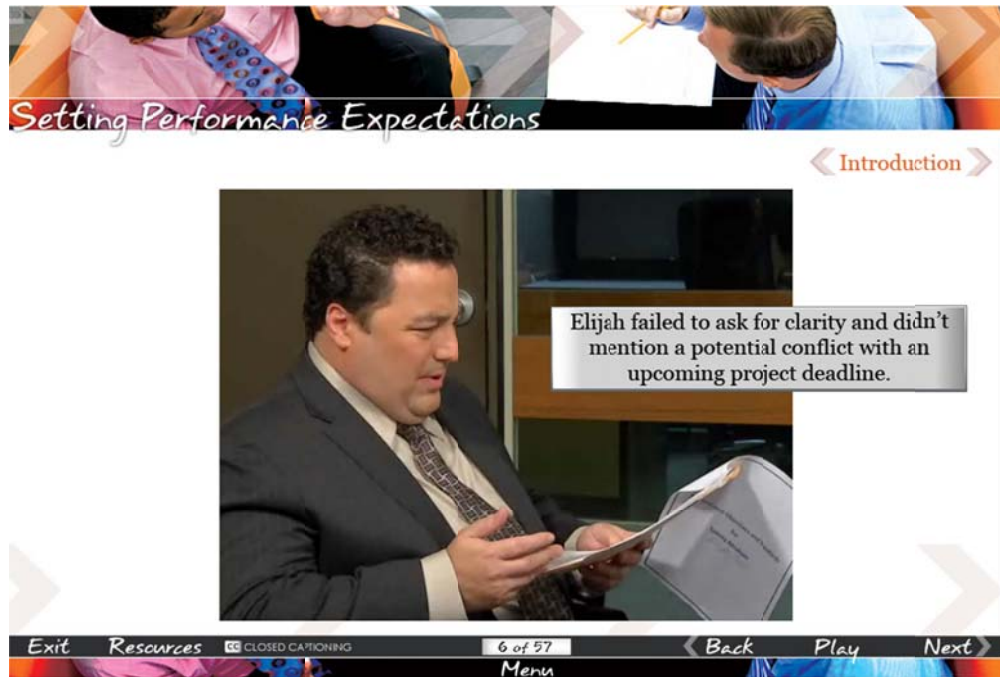


The screenshot shows the same video player interface as Screen 4, but with a text overlay box in the bottom left corner. The text in the box reads: "Jade wasn't prepared to discuss the expected behaviors for Elijah's job, or explain their relationship to his performance elements or objectives." The video frame shows the same man in a suit looking at a document. The control bar at the bottom is identical to the one in Screen 4, but the "4 of 57" indicator now shows "5 of 57".

**Narrator:** Jade wasn't prepared to discuss the expected behaviors for Elijah's job, or explain their relationship to his performance elements or objectives.

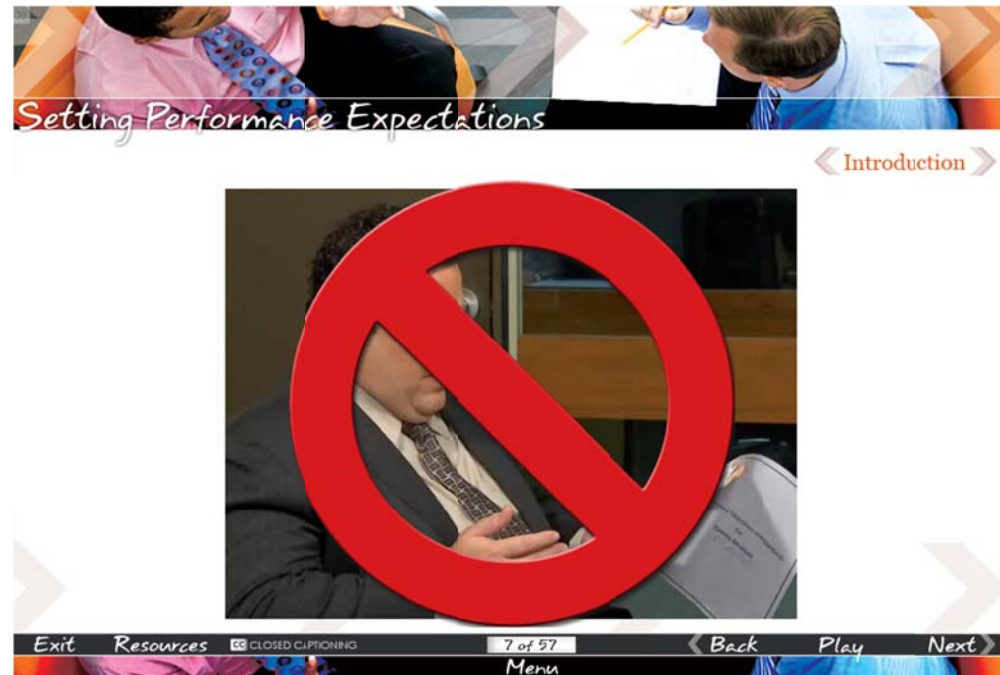


Screen 6:



**Narrator:** Elijah failed to ask for clarity, and didn't mention his wife's upcoming surgery and how it may interfere with him successfully fulfilling his job expectations.

Screen 7:



**Narrator:** Don't get caught in this situation.

**Screen 8:**



**Setting Performance Expectations**

◀ Introduction ▶

Action Strategies for an Effective Performance Expectations Discussion:

1. Understand the purpose of the performance expectations discussion.
2. Prepare for success.
3. Communicate clearly and effectively.
4. Follow up to ensure success.

Exit Resources CC CLOSED CAPTIONING 8 of 57 Menu Back Pause Next

**Narrator:** Whether you are a manager/supervisor or an employee, in this module you will learn four action strategies that will help you have an effective performance expectations discussion. The action strategies are:

1. Understand the purpose of the performance expectations discussion.
2. Prepare for success.
3. Communicate clearly and effectively.
4. Follow up to ensure success.

Let's look at the first action strategy.

**Screen 9:**



**Setting Performance Expectations**

◀ 1. Purpose of the Discussion ▶

Painter Electrician Plumber Builder

Exit Resources CC CLOSED CAPTIONING 9 of 57 Menu Back Pause Next

**Narrator:** Suppose there were no architects and no blueprints and thus, when it came time to build a


house the builder, the electrician, the plumber, and the painter all did their own thing. And the end result? Well, probably not what you'd consider your dream home.

**Screen 10:**



## Setting Performance Expectations

1. Purpose of the Discussion



There is value in having a plan and a systematic approach to carrying out the plan.

Exit Resources CLOSED CAPTIONING 10 of 57 Menu Back Pause Next

**Narrator:** Obviously, there is value in having a plan and a systematic approach to carrying out the plan.

**Screen 11:**



## Setting Performance Expectations

1. Purpose of the Discussion



Chances of meeting your organization or department goals are small if each person in your department is unaware of the goals or the plan on how to achieve them.

Exit Resources CLOSED CAPTIONING 11 of 57 Menu Back Pause Next

**Narrator:** You may not be building a house in your department this year, but most likely you have department goals and objectives you need to accomplish.



Screen 12:



Setting Performance Expectations

1. Purpose of the Discussion

"Let's take a moment to review your job responsibilities. First,..."

Exit Resources CC CLOSED CAPTIONING 12 of 57 Menu Back Pause Next

This screen features a video of a woman in a black jacket and glasses talking to a man in a suit. A yellow speech bubble contains the text: "Let's take a moment to review your job responsibilities. First,..." The navigation bar at the bottom includes buttons for Exit, Resources, CC, CLOSED CAPTIONING, 12 of 57, Menu, Back, Pause, and Next.

**Narrator:** This is where the purpose of the performance expectations discussion comes into play. It's a great tool for ensuring that each team member is aware of his or her responsibilities and how and when he or she is expected perform those responsibilities.

Screen 13:



Setting Performance Expectations

1. Purpose of the Discussion

The performance expectations discussion is a great tool for ensuring that people are not just working hard, but working hard on the things that matter most.

Exit Resources CC CLOSED CAPTIONING 13 of 57 Menu Back Pause Next

This screen features a video of a man in a striped shirt sitting at a desk with a computer. The navigation bar at the bottom includes buttons for Exit, Resources, CC, CLOSED CAPTIONING, 13 of 57, Menu, Back, Pause, and Next.

**Narrator:** An effective performance expectations discussion ensures that people are not just working hard, but working hard on the things that matter most.

Screen 14:



## Setting Performance Expectations

1. Purpose of the Discussion

A successful performance expectations discussion is as much of an employee responsibility as it is a management one.



Exit Resources CC CLOSED CAPTIONING 14 of 57 Menu Back Pause Next

**Narrator:** Often the success of the performance expectations discussion is seen as a management responsibility, but this is a misnomer. A successful performance expectations discussion is as much of an employee responsibility as it is a management one.

Screen 15:



## Setting Performance Expectations

1. Purpose of the Discussion

Action Strategies for an Effective Performance Expectations Discussion:

- ✓ 1. Understand the purpose of the performance expectations discussion.
- 2. Prepare for success.
- 3. Communicate clearly and effectively.
- 4. Follow up to ensure success.



Exit Resources CC CLOSED CAPTIONING 15 of 57 Menu Back Pause Next

**Narrator:** In Action Strategies 2-4 we will talk more specifically about the manager/supervisor and employee responsibilities as they pertain to actions carried out before, during, and after the discussion.

Let's start with Action Strategy 2.

Screen 16:

Setting Performance Expectations

2. Prepare for Success

Ineffective Example: Neither Jade nor Elijah was prepared for their performance meeting.

Exit Resources CC CLOSED CAPTIONING 16 of 57 Menu Back Pause Next

**Narrator:** In the video at the beginning of the course, neither Jade nor Elijah was prepared for their performance meeting.

Screen 17:

Setting Performance Expectations

2. Prepare for Success

Select Jade and Elijah's photos to see what they did to prepare for a successful performance discussion.


Exit Resources CC CLOSED CAPTIONING 17 of 57 Menu Back Pause Next

**Narrator:** Let's give them an opportunity to correct their mistakes and see how the performance discussion changes as a result.

Select Jade and Elijah's photos to see what they did to prepare for a successful performance discussion.




Screen 18:



Setting Performance Expectations

2. Prepare for Success


Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah



Exit Resources CC CLOSED CAPTIONING 18 of 57 Menu Back Pause Next

**Narrator:** To prepare for a successful performance discussion, Jade first reviewed the IC standards and elements for the positions of her team members.


Screen 19:



Setting Performance Expectations

2. Prepare for Success


Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah



Exit Resources CC CLOSED CAPTIONING 19 of 57 Menu Back Pause Next

**Narrator:** Second, Jade met with her colleagues to discuss and come to an agreement pertaining to the behavior and results they expected to see for the positions in their department.


Screen 20:



## Setting Performance Expectations

2. Prepare for Success

Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah



"I propose that Successful behaviors would include...."

Exit Resources CC CLOSED CAPTIONING 20 of 57 Menu Back Pause Next

**Narrator:** Jade and her colleagues also used this time to identify concrete examples of what behavior would look like for each of the rating standards.


Screen 21:



## Setting Performance Expectations

2. Prepare for Success

Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah



Jade...

1. Identified the goals for her team.
2. Prepared her materials for the meeting.
3. Created an outline of the points she wanted to cover in the meeting.
4. Scheduled a time to meet with Elijah in a private location.

Exit Resources CC CLOSED CAPTIONING 21 of 57 Menu Back Pause Next

**Narrator:** Third, Jade identified the goals for her team, prepared her materials for the meeting, created an outline of the points she wanted to cover in the meeting, and scheduled a time to meet with Elijah in a private location.



Screen 22:

**Setting Performance Expectations**

**2. Prepare for Success**

*Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah*

“The greatest challenge you’ll face in coaching is not the individual’s performance, but your own clarity. Far too few managers know how to articulate the difference between mediocre performance and great performance. **And if you can’t describe it you can’t expect it.** You must do the hard work of detailing the behaviors and results you expect to see and contrasting those with typical mediocre performance. Every minute you spend more expertly articulating expectations will save you an hour in debate and resentment later.”

Grenny, J. (2009, March 25). Q & A: Addressing Mediocre Performance. *Crucial Skills*, 7(12).

Exit Resources CLOSED CAPTIONING 22 of 57 Menu Back Pause Next

**Narrator:** Taking time to prepare for the performance discussion meeting may sound like more work, but consider the following quote:

“The greatest challenge you’ll face in coaching is not the individual’s performance, but your own clarity. Far too few managers know how to articulate the difference between mediocre performance and great performance. **And if you can’t describe it you can’t expect it.** You must do the hard work of detailing the behaviors and results you expect to see and contrasting those with typical mediocre performance. Every minute you spend more expertly articulating expectations will save you an hour in debate and resentment later.”

Screen 23:

**Setting Performance Expectations**

**2. Prepare for Success**

*Effective Example: How Elijah Prepared for a Successful Performance Expectations Discussion with Jade*

Select Elijah’s photo to review how he prepared for the meeting. If you have already reviewed how Elijah prepared, select the “Go To Strategy #3” button and we’ll review Action Strategy 3.

**Go To Strategy #3**

Exit Resources CLOSED CAPTIONING 23 of 57 Menu Back Pause Next

**Narrator:** Now that you’ve had a chance to see how Jade prepared, select Elijah’s photo to review how he prepared for the meeting. If you have already reviewed how Elijah prepared, select the “Go to

Strategy 3" button and we'll review Action Strategy 3.

Screen 24:

**Setting Performance Expectations**

**2. Prepare for Success**

*Effective Example: How Elijah Prepared for a Successful Performance Expectations Discussion with Jade*

Elijah...

1. Reviewed organizational goals and considered how his job role could support them.
2. Reviewed the performance standards applicable for his position.
3. Identified potential circumstances that may hinder his ability to accomplish his goals.

Exit Resources CC CLOSED CAPTIONING 24 of 57 Menu Back Pause Next

**Narrator:** To prepare for a successful performance discussion, Elijah first reviewed organizational goals and considered how his job role could support them. Second, he reviewed the performance standards applicable for his position. And finally, he identified potential circumstances that may hinder his ability to accomplish his goals.

Screen 25:

**Setting Performance Expectations**

**2. Prepare for Success**

*Effective Example: How Elijah Prepared for a Successful Performance Expectations Discussion with Jade*

Elijah...

1. Reviewed organizational goals and considered how his job role could support them.
2. Reviewed the performance standards applicable for his position.
3. Identified potential circumstances that may hinder his ability to accomplish his goals.

Exit Resources CC CLOSED CAPTIONING 25 of 57 Menu Back Pause Next

**Narrator:** Elijah will be meeting with Jade in half an hour. Let's watch how he used the time to do some final preparation for the meeting. Select the "Play" button to view the video clip.

**Video Script**

**Setting:** Scene opens with Elijah talking on the phone in his cubicle. The audience only hears one side

of the conversation.

**Elijah:** *(sitting at his desk talking on the phone; glances at his watch)* Hey, Honey, I've got my performance meeting with Jade in half an hour. I'd like to review my notes before the meeting. We can talk more when I get home tonight. *(pauses)* Okay...I'll talk to you later. *(pauses)* What? *(pauses)* Oh, right. Yes, I'll be sure to tell Jade I need some time off when you have your surgery. *(pauses)* Sure. See you tonight. Bye. *(Hangs up phone and picks up his notepad and a pen and starts to review his notes.)*  
*Video fades out.*

**Screen 26:**

**Setting Performance Expectations**

**2. Prepare for Success**

*Effective Example: How Jade Prepared for a Successful Performance Expectations Discussion with Elijah*

Select Jade's photo to review how she prepared for the meeting. If you have already reviewed how Jade prepared, select the "Go To Strategy #3" button and we'll review Action Strategy 3.

**Go To Strategy #3**

Exit Resources CC CLOSED CAPTIONING 26 of 57 Menu Back Pause Next

**Narrator:** Now that you've had a chance to see how Elijah prepared, select Jade's photo to review how she prepared for the meeting. If you have already reviewed how Jade prepared, select the "Go to Strategy 3" button and we'll review Action Strategy 3.

**Screen 27:**

**Setting Performance Expectations**

**3. Communicate Clearly & Effectively**

Both the manager/supervisor and the employee are responsible for clear, effective communication.

Exit Resources CC CLOSED CAPTIONING 27 of 57 Menu Back Pause Next



**Narrator:** Clear and effective communication is the responsibility of both the manager/supervisor and the employee and should happen throughout the performance discussion.

**Screen 28:**

Setting Performance Expectations

3. Communicate Clearly & Effectively

Exit Resources CC CLOSED CAPTIONING 28 of 57 Menu Back Pause Next

**Narrator:** While no two performance discussions will be exactly the same, there are five key topics that should be addressed clearly and effectively at some point in the conversation.

**Screen 29:**

Setting Performance Expectations

3. Communicate Clearly & Effectively

Key Topics to Cover During the Performance Discussion:

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.

Exit Resources CC CLOSED CAPTIONING 29 of 57 Menu Back Pause Next

**Narrator:** The first key topic is that the manager/supervisor should discuss his/her expectations for the employee's performance elements and objectives and, when possible, provide concrete examples. In the event the employee is unsure of his/her manager's expectations he/she should ask for clarification.

**Screen 30:**

The video player interface shows a title bar with 'Setting Performance Expectations' and a subtitle '3. Communicate Clearly & Effectively'. Below the title bar is a list of five key topics to cover during the performance discussion. To the right of the list is a video thumbnail showing a man in a suit (Elijah) standing and talking to a woman in a military uniform (Jade). The video player controls at the bottom include 'Exit', 'Resources', 'CLOSED CAPTIONING', '30 of 57', 'Menu', 'Back', 'Pause', and 'Next'.

**Setting Performance Expectations**

3. Communicate Clearly & Effectively

**Key Topics to Cover During the Performance Discussion:**

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.

Exit Resources CLOSED CAPTIONING 30 of 57 Menu Back Pause Next

**Narrator:** It's time for Elijah's performance expectations discussion with Jade. Let's watch how Jade discusses one of the performance elements with Elijah. Select the "Play" button.

**Video Script**

**Setting:** Exchange between Jade and Elijah. The exchange occurs in Jade's office.

*Elijah walks calmly and confidently towards Jade's office. He is carrying his notepad and a pen. When he reaches Jade's office he knocks on the door.*

**Elijah:** Hi Jade.

*Jade looks up from her computer.*

**Jade:** (warmly) Hello Elijah. You are right on time. (Gets up from her chair and moves around to the side of her desk.) Let's sit at the table (motions for Elijah to have a seat at the table with one of her hands).

*Jade and Elijah sit down at the table.*

**Jade:** (smiles) Hard to believe it's time to start another rating cycle.

**Elijah:** (softly chuckles and nods his head in agreement) Yah, the days and months go by faster than I can keep up with.

**Jade:** (smiles) I'm with you on that one. Well, despite how fast time is flying, I'm glad we have the chance to meet. As you are aware, the purpose of this meeting is to ensure that you and I are in agreement and clear about the performance expectations for your position for the upcoming rating cycle. I know I harp on the importance of frequent and on-going dialogue a lot in our team meetings, and I expect the same in this meeting. This meeting isn't about me telling you what you have to do. Rather, it is about you and I working together to identify how you can help the organization achieve its mission, how I can support you in reaching your goals, and identifying ways to help you develop your



talents and abilities. *(soft smile)* As such, I'd better not be the only one talking in this meeting.

**Elijah:** *(smiles and chuckles softly)* You got it.

**Jade:** Let's start by reviewing the performance elements, standards, and objectives for your position, and talk about specific expectations for each of them. *(Jade hands Elijah a stapled document.)*

**Jade:** In this document I've included your performance objectives, the six elements and their definitions, and the performance standards for your work category and work level. You are in the Professional work category at the Full Performance level. Before we review the standards and your objectives, do you have any questions about the six elements or their definitions?

**Elijah:** *(shakes his head slightly)* No. I reviewed the definitions before our meeting to refresh my memory.

**Jade:** Good. Okay then, let's look at the performance standards. *(Jade and Elijah each turn to the performance standards section of their documents.)* We'll start with the standards for the Communication element. As you can see there are four performance standards for both the Successful and Outstanding ratings.

Last week I met with the other managers in our department to discuss the types of behavior and results we would expect to see for these standards as they pertain to your job as an All-Source Analyst. Knowing that most of the communication activities for your job come in the form of reports and briefs, we discussed the types of activities that would distinguish Outstanding work from Successful work.

Let's talk for a minute about what would distinguish an Outstanding brief from a Successful one. Do you remember the brief you gave in August to Dr. Hunsaker?

**Elijah:** *(nods his head and smiles)* Yes. That was a fun brief to deliver.

**Jade:** *(smiles)* Well, not only was it "fun" as you describe, but I would consider it an Outstanding brief. In comparison, the brief you gave last week was a Successful brief. As you think about the two briefs, what do you think made the difference?

**Elijah:** *(reflective)* Hmmm...well, for one thing, I felt more confident when I delivered the brief in August than I have in other briefs. I was comfortable with the material and my presentation seemed to flow really well. I also felt connected to the audience, more so than I have at other times.

**Jade:** I would agree with your observations. There were a few behaviors I noticed during that brief that set it apart from your other briefs. First, I could tell that you knew your material. Because of this, you were able to focus more on the audience and not so much on your slides. You were dynamic at picking up the customer's facial expressions and adjusting your presentation to answer his questions or clarify his concerns. Second, the way you organized the brief was really effective. I liked how you addressed the customer's main concern first and then provided additional material, where needed. This approach kept the brief succinct, on target, and focused on what the customer cared about most. Finally, your slides contained a good mix of text and photos, and provided enough information without being overwhelming. They complimented your presentation, and I liked that you didn't read them to the audience.

**Elijah:** *(reflective)* Interesting. I hadn't considered that what made the brief in August so much fun is the way that I had prepared. This helps me know what I can do improve future briefs. Thanks.

**Jade:** I'm glad to hear this is helpful. Let's talk for a minute now about what distinguishes a Successful report from an Outstanding one....*video fades out.*

**Screen 31:**

Setting Performance Expectations

3. Communicate Clearly & Effectively

"There were a few behaviors I noticed during that brief that set it apart from your other briefs. First, I could tell...."

Exit Resources CC CLOSED CAPTIONING 31 of 57 Menu Back Pause Next

**Narrator:** Did you notice how Jade gave Elijah specific examples to help him understand the difference between Successful and Outstanding performance for the Communication element as they pertained to Elijah's briefs?

**Screen 32:**

Setting Performance Expectations

3. Communicate Clearly & Effectively

"For this report I'm not looking for the traditional essay format. Rather, I'd like to see something more along the lines of a detailed, bulleted outline."

Exit Resources CC CLOSED CAPTIONING 32 of 57 Menu Back Pause Next

**Narrator:** Another effective way to clarify expectations for an individual's performance elements and objectives is to contrast what you don't want with what you do want.

Screen 33:

The screenshot shows a video player interface. At the top, there's a title bar with the text "Setting Performance Expectations" in a stylized font. Below the title bar, on the right, is a navigation menu with the item "3. Communicate Clearly & Effectively" highlighted. On the left, under the heading "Key Topics to Cover During the Performance Discussion:", there is a numbered list of five topics. In the center, there is a video frame showing two men in an office setting; one man is wearing a military uniform. Below the video frame, there is a control bar with buttons for "Exit", "Resources", "CLOSED CAPTIONING", "33 of 57", "Menu", "Back", "Pause", and "Next".

**Setting Performance Expectations**

3. Communicate Clearly & Effectively

**Key Topics to Cover During the Performance Discussion:**

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.

Exit Resources CLOSED CAPTIONING 33 of 57 Menu Back Pause Next

**Narrator:** The second key topic is to identify how the employee's performance objectives link to the organization's mission and goals. Select the "Play" button to watch how Jade explains the connection to Elijah.

**Video Script**

**Setting:** Exchange between Jade and Elijah. The exchange occurs in Jade's office.

*Video fades in.*

**Jade:** *(looks at her notebook)* Well, let's see, we've talked about examples for the performance elements and standards. Let's spend a few minutes now talking about your performance objectives and how they link to the organization's mission. *(Elijah nods his head in agreement.)*

As you've heard me say before, the performance elements describe HOW you do your job and your performance objectives identify WHAT you do. Your performance objectives should reflect your most important work activities and show how your work supports the organization's mission. Think about it this way. Suppose that during a football game, each player ran the play he liked the best without considering what the other players were doing. If that were to happen, how likely is it that the team will win the game?

**Elijah:** *(smiles)* Not likely. Sounds more like a recipe for chaos.

**Jade:** *(smiles)* Right. In order for the team to be most effective and have a better chance at winning the game, it's important that all the players are on the same page, working towards a common goal. It's no different in our organization. We write performance objectives that support the organization's goals, and thereby assure that you are not only working hard, but working on the activities that matter most.

**Elijah:** Sure. I see why it's important we are all working towards a common goal.

**Jade:** With that in mind, let's talk specifically about your performance objectives. In your packet there

are three draft objectives for your position. (*Elijah and Jade turn to the performance objectives section in their packets.*) When my colleagues and I met to discuss our expectations for the elements, we discussed what we thought were the most important work activities for your position. I then drafted the objectives you see in your packet according to the SMART criteria. That is, specific, measurable, achievable, relevant, and time-bound. By no means though are the objectives final. I thought it would be helpful if we had a place to start. I am certainly open to your feedback. I would like to collaborate to develop performance objectives that are meaningful to you and will help you feel you are contributing to our department and organizational goals, will cause you to stretch to obtain them, and will help you learn new skills and information. After we decide on your performance objectives, we'll then talk about the specific behaviors I would expect to see for both the Successful and Outstanding ratings.

Okay, let's start with draft objective one. Take a moment to read through it and then...*video fades out.*

**Screen 34:**

**Setting Performance Expectations**

3. Communicate Clearly & Effectively

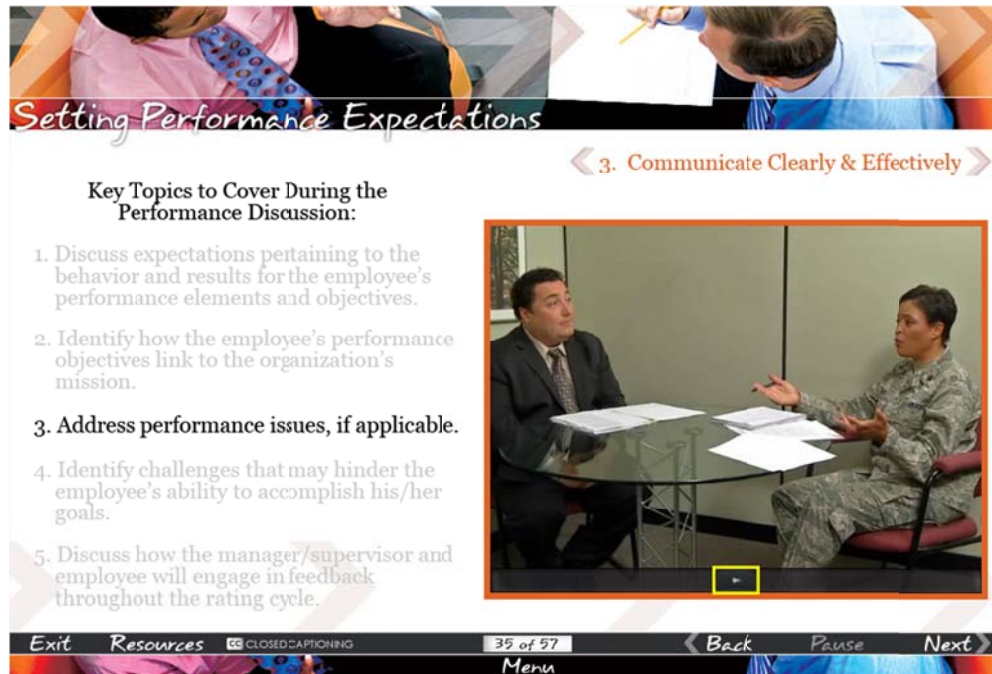
"We write performance objectives that support the organization's goals, and thereby assure that you are not only working hard, but working on the activities that matter most."

Exit Resources CC CLOSED CAPTIONING 34 of 57 Menu Back Pause Next

**Narrator:** As Jade explained to Elijah in our last video clip, it's important that employees have a clear understanding as to how the work they do contributes to the organization's mission.



Screen 35:



The screenshot shows a video player interface. At the top, the title 'Setting Performance Expectations' is displayed in a stylized font. Below the title, the section '3. Communicate Clearly & Effectively' is highlighted. The main content area lists 'Key Topics to Cover During the Performance Discussion:' followed by five numbered points. To the right of the list is a video frame showing a man in a suit and a woman in a military uniform sitting at a round table, engaged in a discussion. The video player controls at the bottom include 'Exit', 'Resources', 'CLOSED CAPTIONING', '39 of 97', 'Menu', 'Back', 'Pause', and 'Next'.

**Setting Performance Expectations**

3. Communicate Clearly & Effectively

**Key Topics to Cover During the Performance Discussion:**

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.

Exit Resources CLOSED CAPTIONING 39 of 97 Menu Back Pause Next

**Narrator:** Continuing with our key topics, the performance expectations discussion is a good time to address any performance issues, if applicable. Let's watch how Jade addresses an issue with Elijah. Select the "Play" button.

**Video Script**

**Setting:** Exchange between Jade and Elijah. The exchange occurs in Jade's office.

*Video fades in.*

**Jade:** Thanks for sharing your ideas. I think we've identified solid performance objectives. Should the organization's mission or goals change we may need to make modifications, but I think we're off to a good start. *(looks at her notes)* The next item I'd like to discuss is the timeliness of your reports *(Elijah shifts nervously in his chair)*. My intent is not to rehash everything we talked about a few months ago. I've seen steady improvement since we last talked about your late reports. *(Elijah relaxes)* What I'd like to do is spend a few minutes discussing what's working, any challenges you are facing, or any additional ways I can help you stay on track during this rating cycle. Will you please share with me how things are going?

**Elijah:** *(thoughtful)* Well, Don has been a great mentor. He has showed me a few search tips that have helped me find the data I need faster than I used to be able to find it. And, not only am I finding the data faster, but the quality of the data is also better.

**Jade:** *(nods head in agreement)* Yes, I've noticed.

**Elijah:** There are a couple of other things that I think would help me.

**Jade:** *(encouragingly)* Okay.

**Elijah:** Some of the team members and I were talking and we thought it would be helpful if we could have a brown bag lunch once or twice a month where we could share tips and best practices with each



other. There's so much going on all the time, it's hard to keep up with new developments or methods. It would be helpful to hear what other people are doing.

**Jade:** That's a great idea. What do you think if we went beyond just our team and extended an invitation to the other analysts on our floor? Would you be okay with that?

**Elijah:** *(nods his head in agreement)* Sure. I think the more tips and experiences shared the better.

**Jade:** *(smiles)* Okay. Good. I will present the idea to the managers in my next meeting with them and I'll get back to you *(writes herself a note on her notebook and then looks at Elijah)*. You said there were a couple of things that would help you. How else can I support you?

**Elijah:** I saw this advertisement for a research and writing class *(hands Jade a piece of paper)*. From the class description it looks like it would be a good fit for my job.

**Jade:** *(takes a moment to scan the document)* Yes, I agree. It does look like a good fit. I know the department manager who is teaching the class. I'll talk to her and find out more about the details and will then get back to you as to whether it will work for you to take the class or not *(writes herself a note on her notebook and then looks at Elijah)*. If it doesn't work for some reason, then we'll explore other options. Anything else?

**Elijah:** No, that's it.

**Jade:** Okay. I appreciate you coming prepared with some ideas. I will let you know what I find out for both of them.

**Elijah:** Sounds good.

**Screen 36:**

**Setting Performance Expectations**

3. Communicate Clearly & Effectively

"What I'd like to do is spend a few minutes discussing what's working, any challenges you are facing, or any additional ways I can help you stay on track during this rating cycle."

U.S. AIR FORCE

Exit Resources CC CLOSED CAPTIONING 36 of 57 Back Pause Next Menu

**Narrator:** In the last video clip, did you notice how Jade used the performance discussion as an opportunity to ensure Elijah had what he needed to stay on track with a performance issue they had discussed in the previous rating cycle?

Screen 37:

Setting Performance Expectations

3. Communicate Clearly & Effectively

The performance discussion is a great time to check in with your employees and ensure they have what they need to be successful during the upcoming rating cycle.

Exit Resources CLOSED CAPTIONING 37 of 57 Menu Back Pause Next

**Narrator:** Even if you don't have a performance issue to discuss with your employee, this is a great time to ensure your employee has what he/she needs to be successful during the upcoming rating cycle.

Screen 38:

Setting Performance Expectations

3. Communicate Clearly & Effectively

Key Topics to Cover During the Performance Discussion:

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.

Exit Resources CLOSED CAPTIONING 38 of 57 Menu Back Pause Next

**Narrator:** The fourth key topic is to identify challenges that may hinder the employee's ability to accomplish his/her goals. Let's watch how Elijah shares a potential challenge with Jade. Select the "Play" button.

**Video Script**

**Setting:** Exchange between Jade and Elijah. The exchange occurs in Jade's office.

*Video fades in.*

**Jade:** Before we conclude our meeting is there anything else you'd like to talk about?

**Elijah:** Yes, there is. My wife is going to have surgery in a couple of months and I'd like to take some time off to help her. Unfortunately though, the surgery is scheduled for the same week that the Anderson project is due. I know this is an important project for one of my performance objectives, but I'd also really like to support my wife. We could try moving the surgery, but it may not be easy to do that.

**Jade:** Thanks for sharing this with me. I am certainly supportive of your desire to help your wife. A couple of ideas come to mind. We can either have you finish your part of the project prior to when you go on leave, or I could switch you to a different project that would be due after you get back from leave. Do you have a preference?

**Elijah:** I'd really like to stay on the Anderson project if I can. I've already got a good start on the project, and I really enjoy working with this customer. I just don't want to let the team down if I am gone when the project is due.

**Jade:** Thanks for considering the needs of the team. Let's do this, we'll meet with Melissa, the team lead, and come up with a plan that will allow you to do your part for the project and help your wife.

**Elijah:** (*relieved and happy*) That would be great. Thanks!

**Jade:** (*smiles*) You're welcome.

**Screen 39:**



**Narrator:** While we can't be certain about the outcome, most likely there would have been challenges had Elijah not said anything about his wife's surgery. Communicating possible challenges early and often is always a good practice.

**Screen 40:**



*Setting Performance Expectations*

« 3. Communicate Clearly & Effectively »

**Key Topics to Cover During the Performance Discussion:**

1. Discuss expectations pertaining to the behavior and results for the employee's performance elements and objectives.
2. Identify how the employee's performance objectives link to the organization's mission.
3. Address performance issues, if applicable.
4. Identify challenges that may hinder the employee's ability to accomplish his/her goals.
5. Discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle.



Exit Resources CC CLOSED CAPTIONING 40 of 57 Menu « Back Pause Next »

**Narrator:** The final key discussion point is to discuss how the manager/supervisor and employee will engage in feedback throughout the rating cycle. Let's watch how Jade and Elijah discuss this. Select the "Play" button.

**Video Script**

**Setting:** Exchange between Jade and Elijah. The exchange occurs in Jade's office.

*Video fades in.*

**Jade:** Is there anything else you'd like to discuss today?

**Elijah:** No, I think we've about covered everything.

**Jade:** Yes, just about. The last thing I'd like to touch base on is how we give each other feedback throughout the cycle. As you know, I'm a big proponent of frequent, on-going dialogue in an informal, address-it-when-it-happens manner. I'm a people person and tend to give my feedback in person. But, I realize that that approach may not always work for each person, and that some people prefer email or phone calls over face-to-face meetings. Granted, sometimes a face-to-face meeting is what's needed, but I am open to hearing your preferences for feedback.

**Elijah:** Hmmm...I guess I hadn't really thought about it before. I'm not opposed to feedback via email or phone, but given the choice I like in-person discussions better. Either way though, just getting feedback is really helpful. If I'm doing something that can be improved, I'd rather you said something so I could make adjustments rather than wait until a more formal meeting time.

**Jade:** Okay. Good to know. On that same page, I too would rather hear from you if something is not working than to have you wait until a formal meeting or until the problem escalates. The earlier I know about a problem or concern, the better. So, to recap, it sounds like we both prefer informal, in-person feedback when the situation permits. Would you agree?



**Elijah:** Yes, I agree.

**Jade:** (*sincerely*) Good. Well, it's certainly been a pleasure to meet with you today. I'm glad you are on the team and I really appreciate your positive attitude and a willingness to learn new things. I look forward to working with you this year.

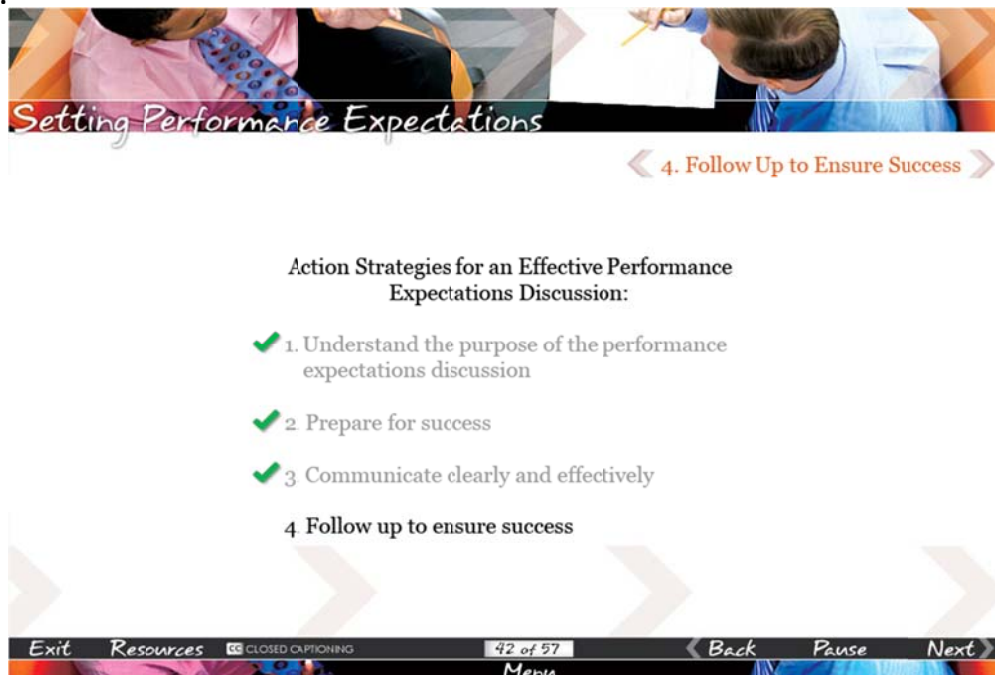
**Elijah:** (*sincerely*) Thanks. I too am looking forward to the coming year. *Video fades out.*

**Screen 41:**



**Narrator:** Discussing how they will engage in feedback throughout the rating cycle gave Jade and Elijah an opportunity to better understand each other's feedback preferences and how they could help each other succeed.

**Screen 42:**



**Narrator:** This brings us to Action Strategy #4 which is to follow up throughout the rating cycle to



ensure success. Once you've identified how you will engage in feedback, it's time to put your plans into action. Again, this is both a manager/supervisor and employee responsibility.

**Screen 43a:**

Setting Performance Expectations

4. Follow Up to Ensure Success

Ongoing coaching and feedback

Adjust expectations and/or performance goals, as needed

Keep track of employee accomplishments

Select each image to learn more about the three key follow up activities.

Exit Resources CC CLOSED CAPTIONING 43 of 57 Menu Back Pause Next

**Narrator:** Following up includes three key activities: one, providing on-going coaching and feedback; two, adjusting expectations and/or performance goals, as needed, when changes within the organization or department occur; and three, keeping track of employee accomplishments.

Select each image to learn more about the three key follow up activities.

**Screen 44:**

Setting Performance Expectations

Return to Action Strategy 4

4. Follow Up to Ensure Success: On-going Coaching & Feedback

Ongoing coaching and feedback

Exit Resources CC CLOSED CAPTIONING 44 of 57 Menu Back Pause Next

**Narrator:** (What you would hear if you selected "Ongoing coaching and feedback.") Opportunities to give and seek coaching and feedback can occur in formal, scheduled meetings, but certainly are not limited to this.

Screen 45:



**Narrator:** Some of the best opportunities to provide or ask for coaching and feedback come during informal settings such as when a manager/supervisor are walking down the hall after an interaction with a customer.

There are additional courses where you will learn effective coaching and feedback skills. To download a list of these courses, select the “Coaching Resources” button. Otherwise, select the “Return to Action Strategy 4” button to learn about another follow up activity.

Screen 43b:



**Narrator:** Select another image to learn more about the three key follow up activities. When you have reviewed all three key follow up activities, select the “Conclusion” button to conclude the course.

Screen 46:



**Narrator:** (What you would hear if you selected “Adjust expectations and/or performance goals, as need.”) Unanticipated events such as a new product or tool, gaining or losing staff, or a shift in organizational priorities may create changes in your organization’s or department’s goals.

Screen 47:



**Narrator:** In order to meet the new priorities and goals, performance expectations may need to be reassessed and adjusted.



Screen 48:



**Narrator:** When changes occur, managers/supervisors should take the lead on ensuring their employees' goals and expectations are still relevant and aligned.

Screen 49:



**Narrator:** Employees can assist in this process by paying attention to the changes and offering ideas as to how they can individually help meet the new priorities and goals. This concludes follow up activity two. Select the "Return to Action Strategy 4" button to learn about another follow up activity.



Screen 43c:

*Setting Performance Expectations*

4. Follow Up to Ensure Success



Ongoing coaching and feedback

Adjust expectations and/or performance goals, as needed

Keep track of employee accomplishments

Select each image to learn more about the three key follow up activities.

Go To Conclusion

Exit Resources CLOSED CAPTIONING 43 of 57 Menu Back Pause Next

**Narrator:** Select another image to learn more about the three key follow up activities. When you have reviewed all three key follow up activities, select the “Conclusion” button to conclude the course.

Screen 50:

*Setting Performance Expectations*

Return to Action Strategy 4


4. Follow Up to Ensure Success: Keep Track of Accomplishments



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**Narrator:** (What you would hear if you selected “Keep track of employee accomplishments.”) Keeping track of employee accomplishments throughout the rating cycle is a small time investment with big payoffs at the end of the rating cycle.


Screen 51:



Setting Performance Expectations

Return to Action Strategy 4

4. Follow Up to Ensure Success: Keep Track of Accomplishments




*For Managers/Supervisors - Value of Having a Record of Your Employees' Accomplishments:*

1. Makes it easier to accurately assess and assign performance ratings.
2. Provides concrete examples you can use during performance discussions with your employees and when writing your narrative at the end of the rating cycle.

Exit Resources CC CLOSED CAPTIONING 51 of 57 Menu Back Pause Next

**Narrator:** Having a record of employee accomplishments makes it easier for a manager/supervisor to accurately assess and assign performance ratings. It also provides concrete examples which the managers/supervisor can use during performance discussions with his/her employees and when writing their narrative at the end of the rating cycle.


Screen 52:



Setting Performance Expectations

Return to Action Strategy 4

4. Follow Up to Ensure Success: Keep Track of Accomplishments




*For Employees - Value of Keeping Track of Your Accomplishments:*

1. Makes it easier to write an effective and detailed self-report of accomplishments narrative at the end of the rating cycle.
2. Provides concrete examples you can use to accurately portray how you contributed to your organization's mission and goals.

Exit Resources CC CLOSED CAPTIONING 52 of 57 Menu Back Pause Next

**Narrator:** For employees, keeping track their own accomplishments makes it easier for them to write an effective and detailed self-report of accomplishments narrative at the end of the rating cycle that accurately portrays how he/she contributed to the organization's mission and goals.

Screen 53:



Return to Action Strategy 4

4. Follow Up to Ensure Success: Keep Track of Accomplishments

For Employees:

Accomplishment Tracking Log		
<p>Use the S.T.A.R. method to take notes. S: Situation, T: Task, A: Action, R: Results</p> <ul style="list-style-type: none"> <li>Keep notes pertaining to both your performance objectives and accomplishments.</li> <li>Keeping thorough notes will make it easier to write a Self Report of Accomplishments at the end of the rating period.</li> <li>Include notes about the conditions under which you achieved your accomplishment and any obstacles you encountered.</li> <li>Include notes about the specifics of what you did and the outcome or end product. What was the impact in terms of time, money, or effort?</li> </ul>		
Objective 1	Objective 2	Objective 3
<p>Take notes using the S.T.A.R. method: Include details about the Situation (including any challenges), Task, Actions you took, and the Results your efforts created &amp; who benefited. Reference applicable elements where appropriate.</p>		
Date	Notes	Notes

For Managers/Supervisors:

Employee Performance Behavior and Results				
<p>Use the S.T.A.R. method to take notes. S: Situation, T: Task, A: Action, R: Results</p> <ul style="list-style-type: none"> <li>Keep notes pertaining to both your employee's performance objectives and accomplishments.</li> <li>Use keywords to stay focused.</li> <li>Identify both the behavior and the results of the behavior.</li> <li>Include both positive and negative examples, as appropriate.</li> </ul>				
Date	Employee	Behavior Situation, Task, & Action	Results	Objective Element(s) Reference


Accomplishment Resources

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**Narrator:** One tool you can use to keep track of accomplishments is the Accomplishments Tracking Log. Based on your position, select the applicable image to download a copy of the tool.

To learn more about the value of keeping track of accomplishments and additional tools you can use, select the "Accomplishment Resources" button. This concludes follow up activity three. Select the "Return to Action Strategy 4" button to learn about another follow up activity.


Screen 43d:




4. Follow Up to Ensure Success



Ongoing coaching and feedback



Adjust expectations and/or performance goals, as needed



Keep track of employee accomplishments

Select each image to learn more about the three key follow up activities.

Go To Conclusion

Exit Resources CLOSED CAPTIONING 43 of 57 Menu Back Pause Next

**Narrator:** Select another image to learn more about the three key follow up activities. When you have reviewed all three key follow up activities, select the "Conclusion" button to conclude the course.



Screen 55:



Setting Performance Expectations

Conclusion

Ineffective Example

Effective Example

Exit Resources CLOSED CAPTIONING 55 of 57 Menu Back Pause Next

**Narrator:** (What you would hear if you selected the “Conclusion” button.) We’ve reached the end of the course. As we talked about earlier, no two performance discussions will be exactly the same. But, like Jade and Elijah discovered, you can proactively take steps to increase the success of your performance discussions by implementing the four action strategies we have discussed in this course.

Screen 56:



Setting Performance Expectations

Conclusion

Action Strategies for an Effective Performance Expectations Discussion:

1. Understand the purpose of the performance expectations discussion.
2. Prepare for success.
3. Communicate clearly and effectively.
4. Follow up to ensure success.


Exit Resources CLOSED CAPTIONING 56 of 57 Menu Back Pause Next

**Narrator:** To review, the action strategies are:

1. Understand the purpose of the performance expectations discussion.
2. Prepare for success.
3. Communicate clearly and effectively.
4. Follow up to ensure success.




Screen 57:



Setting Performance Expectations

« Conclusion »




Thank you for completing the course!

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Menu

**Narrator:** Throughout the course we identified resources to help you implement the action strategies. Select the “Resources” button to download course job aids and/ or a paper-based version of the course. Thanks for completing the course!

**Resources Button:**



Setting Performance Expectations

« Resources »

Job Aids

- [List of Coaching and Feedback Resources](#)
- [List of Accomplishment Resources](#)
- [For Employees - Accomplishment Tracking Log](#)
- [For Managers/Supervisors - Employee Behavior and Results Tracking Log](#)
- [IC Performance Standards](#)

Print Course Slides

Performance Management Training

TakeAways

Exit Resources CC CLOSED CAPTIONING 57 of 57 « Back Pause Next »

Menu

**Narrator:** Select each job aid title to download a copy. If you’d like a paper-based version of the course for reference, select the “Print Course Slides” button. Finally, for additional information on performance management, such as how to hold effective coaching and feedback sessions with your employees, select the “Performance Management Training” button to download a list of training materials and instructions on how you can access them.